



Filing ID #10031152

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Elizabeth Kreiselmaier  
**Status:** Congressional Candidate  
**State/District:** WA06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 12/17/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset      | Income Type(s)  | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------|---|-------------------------------|-----------------------|
| Advanced Micro Devices, Inc. (AMD) [ST]   | SP    | \$1,001 - \$15,000  | Capital Gains   | Not Applicable                | Not Applicable        |
| DESCRIPTION: spouse owns 100 shares of AMD stock held in his Schwab One brokerage account at Charles Schwab. Income for each period was marked N/A because the stock hasn't been sold yet, so no income has been generated. The total cost basis for the shares is 724.95 and the total current value is \$3062.06  |       |                     |   |                               |                       |
| Albert Nelson Jackson Family Limited Partnership (FLP) [EQ]   | SP    | Undetermined        | Capital Gains, Dividends, Excepted/Blind Trust, Interest, distributions at discretion of spouse's parents, Rent | \$15,001 - \$50,000           | \$15,001 - \$50,000   |
| DESCRIPTION: Spouse is listed in this trust as owning a 3.77% share of the total assets, which are under the complete control of his parents. He is not informed of or involved in decision-making about any of its assets. His parents make periodic distributions to spouse as one of their 3 sons. Value and type of assets held are unknown, but we believe consist of a variety of investment vehicles/income streams checked above. |       |                     |   |                               |                       |
| BNY Mellon Common Stock [OT]  | SP    | \$15,001 - \$50,000 | Tax-Deferred  |                               |                       |
| DESCRIPTION: Employer Stock held in spouse's 401k retirement account from his former employer (Mellon Capital)  |       |                     |   |                               |                       |
| Brent's savings account [BA]  | DC    | \$1,001 - \$15,000  | Interest  | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Chase bank savings account for our son who is a freshman in college  |       |                     |   |                               |                       |

| Asset  | Owner | Value of Asset        | Income Type(s)       | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------------|-------------------------------|-----------------------|
| Brighthouse Variable Annuity Series XC [OT]  |       | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: IRA variable annuity account for Elizabeth Kreiselmaier held at Brighthouse Financial which is part of Brighthouse Life Insurance Company in Des Moines, IA |       |                       |                      |                               |                       |
| Business Classic checking account [BA]   |       | \$15,001 - \$50,000   | None                 |                               |                       |
| DESCRIPTION: Business checking account at Chase Bank for Elizabeth Kreiselmaier  |       |                       |                      |                               |                       |
| Business Select Savings account [BA]   |       | \$1 - \$1,000         | Interest             | None                          | None                  |
| DESCRIPTION: Business savings account at Chase Bank for Elizabeth Kreiselmaier   |       |                       |                      |                               |                       |
| Cash and Sweep Money Market Fund [BA]  | JT    | \$15,001 - \$50,000   | Interest             | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Cash in Money Market "cash & sweep" account of Chase Bank Brokerage account   |       |                       |                      |                               |                       |
| Cash and Sweep Money Market Fund [BA]  | JT    | \$1,001 - \$15,000    | Interest             | None                          | None                  |
| DESCRIPTION: Separate small (\$1000) Money Market "Cash & Sweep" account at Chase Bank   |       |                       |                      |                               |                       |
| Chase Plus Savings [BA]  |       | \$100,001 - \$250,000 | Interest             | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Joint savings account at Chase bank   |       |                       |                      |                               |                       |
| Checking account [BA]  | JT    | \$15,001 - \$50,000   | None                 |                               |                       |
| DESCRIPTION: Joint personal checking account at Chase Bank   |       |                       |                      |                               |                       |
| CREF Global Equities [MF]  |       | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of several mutual funds in Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (WestEd)                                      |       |                       |                      |                               |                       |
| CREF Growth R2 [MF]  |       | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of several mutual funds in Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (WestEd)                                      |       |                       |                      |                               |                       |
| CREF Stock R2 [MF]   |       | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of several mutual funds that are part of Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (Wested)                        |       |                       |                      |                               |                       |
| Emerging Markets Equity Fund [MF]  | SP    | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                      |                               |                       |
| Forte Money Market - personal - NW [BA]  | JT    | \$100,001 - \$250,000 | Interest             | \$1,001 - \$2,500             | \$1,001 - \$2,500     |
| DESCRIPTION: Joint Money Market account at Opus Bank   |       |                       |                      |                               |                       |
| Gencyn Assoc Ltd [EQ]  | SP    | Undetermined          | Excepted/Blind Trust | \$201 - \$1,000               | \$201 - \$1,000       |

| Asset  | Owner | Value of Asset        | Income Type(s)       | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------------|-------------------------------|-----------------------|
| DESCRIPTION: Spouse's parents set up and own this family trust which spouse is listed in its forming documents as having a 3.7% portion of. No income is generated to us personally (though we receive K-1s and report income on our own tax return from it) and we are not involved in selecting/distributing assets nor do we have direct benefit from this Trust. It is something that ultimately will result in an inheritance to spouse. Value is unknown.  |       |                       |                      |                               |                       |
| Global Developed Markets Equity Fund [MF]  | SP    | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                      |                               |                       |
| Global Real Asset Fund [MF]  | SP    | \$1,001 - \$15,000    | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                      |                               |                       |
| High School Checking Account [BA]  | DC    | \$1 - \$1,000         | None                 |                               |                       |
| DESCRIPTION: Chase Bank Checking account for our son who is now a freshman in college but he got the account as a high schooler  |       |                       |                      |                               |                       |
| Intl ACWI Ex-U.S. Index Fund [MF]  | SP    | \$15,001 - \$50,000   | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of the mutual funds held in spouse's 401k savings plan from his former employer (Mellon Capital)  |       |                       |                      |                               |                       |
| IRA Rollover Paul Kreiselmaier at Charles Schwab [IH]  | SP    | \$100,001 - \$250,000 | Tax-Deferred         |                               |                       |
| DESCRIPTION: spouse's IRA Rollover held in cash at Charles Schwab  |       |                       |                      |                               |                       |
| Jackson Family Trust [EQ]  | SP    | Undetermined          | Excepted/Blind Trust | \$5,001 - \$15,000            | \$5,001 - \$15,000    |
| DESCRIPTION: Spouse's parents set up and own this family trust which spouse is listed in its forming documents as having a 3.7% portion of. No income is generated to us personally (though we receive and report on k-1s for our own tax returns) and we are not involved in selecting/distributing assets nor do we have direct benefit from this Trust. It is something that ultimately will result in an inheritance to spouse. Value is unknown.  |       |                       |                      |                               |                       |
| Large Cap Stock Index Fund [MF]  | SP    | \$50,001 - \$100,000  | Tax-Deferred         |                               |                       |
| DESCRIPTION: One of the mutual funds held in spouse's 401k savings plan account from his former employer (Mellon Capital)  |       |                       |                      |                               |                       |
| Non-U.S. Developed Markets Equity Fund [MF]  | SP    | \$50,001 - \$100,000  | Tax-Deferred         |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                      |                               |                       |
| Paul A. Kreiselmaier Irrevocable Trust [EQ]  | SP    | Undetermined          | Capital Gains        | \$1,001 - \$2,500             | \$1,001 - \$2,500     |
| DESCRIPTION: Irrevocable trust set up by spouse's parents in which we receive k-1 form for our own tax reporting but from which we derive no income, nor do we have knowledge of or input into assets held in the trust. Value unknown. Will be an inheritance at some point in the future. Both of spouse's parents are living and in control of all trusts mentioned in this financial disclosure form. This trust is held at TD Ameritrade and spouse's parents are the trustees of it and holders of it. Spouse receives |       |                       |                      |                               |                       |
| Personal Checking account [BA]   | JT    | \$1 - \$1,000         | None                 |                               |                       |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| DESCRIPTION: Opus Bank joint checking account  |       |                       |                |                               |                       |
| TIAA Traditional [FN]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| DESCRIPTION: TIAA Traditional annuity contract in Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (WestEd)  |       |                       |                |                               |                       |
| Treasury Inflation-Protected Securities Fund [MF]  | SP    | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                |                               |                       |
| U.S. INTERMEDIATE TERM BOND FUND [MF]  | SP    | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| DESCRIPTION: one of various mutual funds within spouse's former employer (Russell Investments) retirement account  |       |                       |                |                               |                       |
| U.S. Large Cap Equity Fund [MF]  | SP    | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                |                               |                       |
| U.S. Small Cap Equity Fund [MF]  | SP    | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account  |       |                       |                |                               |                       |
| Vacation Rental By Owner property [RP]   | JT    | \$250,001 - \$500,000 | Rent           | None                          | \$2,501 - \$5,000     |
| LOCATION: Olalla / Kitsap, WA, US  |       |                       |                |                               |                       |
| DESCRIPTION: vacation home rented out part-time and seasonally on VRBO   |       |                       |                |                               |                       |
| Vanguard Target Retirement 2030 Inv [MF]   | SP    | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| DESCRIPTION: Spouse's retirement account through employer (Verus Investments) held at Charles Schwab. 100% invested in Vanguard Target Retirement 2030 investment (mutual fund). |       |                       |                |                               |                       |

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

| Source            | Type          | Amount Current Year to Filing | Amount Preceding Year |
|-------------------|---------------|-------------------------------|-----------------------|
| Verus Investments | spouse salary | N/A                           | N/A                   |

SCHEDULE D: LIABILITIES

| Owner | Creditor         | Date Incurred | Type   | Amount of Liability   |
|-------|------------------|---------------|--|-----------------------|
| JT    | Wells Fargo Bank | May 2012      | mortgage on second residence/vacation rental property in Olalla WA | \$100,001 - \$250,000 |

## SCHEDULE E: POSITIONS

| Position  | Name of Organization      |
|---|---------------------------|
| Board member of our neighborhood's Home Owners' Association (HOA) | Estates at Gig Harbor HOA |

## SCHEDULE F: AGREEMENTS

| Date           | Parties To                 | Terms of Agreement   |
|----------------|----------------------------|--|
| September 2001 | WestEd/Far West Laboratory | My TIAA-CREF retirement account is still being administered by my former employer (WestEd/Far West Laboratory) in San Francisco, CA.   |
| December 1993  | Oregon Research Institute  | For several years following my move from Oregon (from Oregon Research Institute) to California (Far West Lab/WestEd), I was sent periodic, very small royalty payment amounts from the sales of several instructional videos I had produced during my time working at ORI. After a number of years, I signed over the right to keep these small checks back to ORI, so that future royalties would simply be donated back to my former employer to save them the inconvenience of sending me periodic tiny checks. |

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Elizabeth Kreiselmaier , 12/17/2019